

Level 2 Certificate in Customer Service



Supporting learning
and performance

Specification

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Introduction

About EDI

EDI is one of the largest awarders of accredited vocational qualifications in the UK and has been involved in providing qualifications for employment for over 100 years. We work with over 1400 centres and we award over 140,000 vocational qualification certificates every year. Our vocational qualifications are developed in collaboration with industry and are used by students and employers as a benchmark for practical skills and quality. They include QCF Qualifications, National Vocational Qualifications (NVQs), Scottish Vocational Qualifications (SVQs), Vocationally Related Qualifications (VRQs), Technical Certificates, apprenticeships and Skills for Life qualifications.

EDI qualifications are accredited on the Qualifications and Credit Framework and are eligible for government funding. EDI offers unrivalled centre support, through online administration, resources and customer care.

In addition, EDI provides a wide range of services for training providers, colleges, employers and schools including customised assessments, bespoke training programmes, innovative interactive online assessments mapped to the national curriculum, an electronic portfolio system, access to high volume printing and broadband facilities. For more details, please visit the EDI website: www.ediplc.com.

What is the QCF?

The Qualifications and Credit Framework (QCF) is a unitised qualification framework underpinned by a system of credit accumulation and transfer. Every unit on the framework will have a credit value which is based on the notional learning hours for that specific unit (for further information, see the section: *What is credit?*). The QCF is designed to allow learners to achieve credit for individual units or qualifications, providing learners with the opportunity to accumulate credit at their own pace and use it to claim for a qualification when they are ready.

Qualifications within the QCF

There are three sizes of qualifications in the QCF:

- **Awards** (1-12 credits)
- **Certificates** (13-36 credits)
- **Diplomas** (37 credits or more)

It is possible to have all three of these qualifications at each level, for example, Level 1 Award, Certificate or Diploma in Business Skills. This is because the classification of the qualification as an Award, Certificate or Diploma refers to the size of the qualification, not the level of difficulty.

Each qualification title will contain the **level** of qualification (eg Entry 2), the **size** (award/certificate/diploma) and details indicating the **content** of qualification. For example:

- **EDI Level 2 Award in Business Skills**
- **EDI Level 1 Certificate for IT Users (ITQ)**

What is credit?

Every unit and qualification on the QCF has been given a credit value, which denotes the number of credits that will be awarded to each candidate who successfully completes the unit or qualification.

- 1 credit represents **10** notional learning hours

Notional learning hours represent the amount of time a learner is expected to take, on average, to complete the learning outcomes of the unit to the standard required within the assessment criteria. This may involve self directed study or independent research. It is important to note that notional learning hours are **not** the same as guided learning hours (GLH). GLH represent the hours during which a tutor or trainer is present and contributing to the learning process. Notional learning hours represent the hours which are needed to successfully cover all the learning required to achieve the unit, either guided or independently.

Rules of combination

Every qualification on the QCF is structured through rules of combination. Rules of combination are important because they define the number of credits which need to be achieved and where these credits must come from in order for a learner to achieve the qualification. Rules of combination also state what the potential is for learners to transfer credits between qualifications and awarding bodies.

QCF IT System

QCA have worked in partnership with the agency, Managing Information Across Partners (MIAP) in order to set up a learner registration system. This service has been designed to support the QCF and facilitate the process of credit accumulation and transfer. The learner registration system allows learning providers to request Unique Learner Numbers (ULN) and individual Learner Achievement Records (LAR) for all candidates who wish to complete a unit or qualification on the QCF.

The Learner Achievement Record (LAR) is an electronic system which enables learners to record their achievements in a central location. Learners are able to make their LAR visible to potential employers and learning providers as required. QCA have developed a guidance document entitled, *Learning Provider's Guide to Using the QCF IT System*, which is available to download on the QCA or EDI website.

If you would like further information regarding the QCF IT system please contact MIAP, either through their website: www.miap.gov.uk/lrs/ or email: lrssupport@miap.gov.uk.

EDI Level 2 Certificate in Customer Service

Aim

The EDI Level 2 Certificate in Customer Service underpins the knowledge and understanding included in the EDI Level 2 NVQ Certificate in Customer Service and as such is appropriate for students of customer service or employees working within a customer service role. The qualification is recognised as the knowledge and understanding element within the Customer Service Apprenticeship.

Credit

The EDI Level 2 Certificate in Customer Service has a credit value of 13.

Previous learning requirements

There are no formal entry requirements for this qualification.

Progression

Learners who achieve the Level 2 Certificate in Customer Service can progress on the Level 3 Certificate and the NVQ level 3 in Customer Service (both part of the Advanced Apprenticeship for Customer Service). In addition, learners may also progress onto a supervisory role.

Guided learning hours

We recommend that **115** guided learning hours (GLHs) provide a suitable course length for an 'average' learner at this level.

Guided learning hours include direct contact hours, as well as other time when learners are completing work that has been agreed with teachers or training providers. It is the responsibility of the centre to decide the appropriate course duration, based on their learners' ability and level of existing knowledge. It is possible, therefore, that the number of GLHs can vary significantly from one training provider to another according to learners' needs

Candidates with particular assessment requirements

We recognise that some candidates will have particular assessment requirements. EDI's policy for candidates with particular requirements is stated in the 'Administration Guide for EDI Centres', which is available via www.ediplc.com or by contacting enquiries@ediplc.com.

Appeals Procedure for Learners

If learners are dissatisfied with an assessment outcome, they have the right of appeal. There are 3 stages in the appeals procedure and each stage must be exhausted before proceeding to the next one. Learners are advised to keep their own copies of all the documents used in the appeals procedure.

The main reasons for an appeal are likely to be:

- learners do not understand why they are not yet regarded as competent, due to lack of or unclear feedback from the Assessor;
- learners believe they are competent and that the Assessor has misjudged them, or has failed to utilise some vital evidence.

Stage 1

If learners receive a decision they are unsatisfied with, they have the right to appeal directly to the Assessor who carried out the assessment. The appeal must be in writing and clearly indicate:

- the points of disagreement;
- the evidence in the portfolio that the learners believe meet the requirements for claiming competence.

Stage 2

Learners who are not satisfied with the outcome of their Stage 1 appeal can next appeal to the centre Internal Verifier. This appeal must be in writing, but need not repeat the detail provided at Stage 1 as all the documentation used at Stage 1 will be passed to the Internal Verifier.

Stage 3

Learners who are not satisfied with the outcome of their Stage 2 appeal and who have exhausted all centre appeals procedures may proceed to Stage 3. This appeal must be in writing to the EDI Quality Assurance Manager, and must be accompanied by copies of all documentation from Stages 1 and 2. There must also be evidence that the learner has exhausted all the centre internal appeals procedures.

An investigation will be undertaken on behalf of EDI and the EDI appeals panel will compile a report for consideration. This consideration will lead to one of two decisions:

EITHER the appeal will either be upheld or rejected

OR the appeals panel will appoint an independent Assessor and require the learner to re-submit their portfolio and be available for interview on an agreed date. The independent Assessor will then report to the appeals panel. The appeal will either be rejected or upheld.

The decision of the appeals panel will be final.

Fee for appeal

A fee is payable for an appeal. The current fee is listed in the Fee Sheet available from EDI Customer Service. The fee will be refunded if the appeal is upheld.

Summary

The appeals procedure aims to ensure the following:

- the operation of the appeals procedure, and results arising from it, are monitored to determine future policy.
- all learners' complaints are acknowledged and investigated to establish the facts and evidence supporting the appeal. If a complaint is considered justified, remedial action will be taken.
- all learners who register an appeal will receive a formal reply within 8 weeks. It is intended that the response will be to the mutual satisfaction of the learner and EDI.

The appeals procedure must be communicated/available in writing to all learners as well as the action they need to take to make use of it.

Composition of the appeals panel

The appeals panel will comprise the chair and three independent members of the Standing Committee, the Head of Product Development and the Quality Assurance Manager.

Structure of the Qualification

To achieve the EDI Level 2 Certificate in Customer Service learners must achieve thirteen credits from completing two mandatory units.

Unit	Title	GLH	Credit
CT179	Level 2 Delivery of Effective Customer Service	50GLH	6
CU854	Level 2 Supporting the Customer Service Environment	65GLH	7

Assessment Methods

One unit in this qualification will be assessed through a multiple choice test and the second unit will be assessed internally.

Unit	Assessment method	Description
CT179 Delivery of effective customer service	Multiple choice	30 Questions, 1 hour
CU854 Supporting the customer service environment	Internal Assessment	Workbook

Internal Assessment

The internal assessment task for unit CU854 is set and moderated by EDI, and marked by the centre, against the assessment criteria in the unit.

The task set by EDI is available to registered centres through the EDI website and consists of a workbook, which learners are able to contextualise to their own experiences. Where this qualification is taken as part of an apprenticeship the assessment task can additionally be used as evidence towards the competence based element.

For the purposes of this qualification the learner's place of work, work placement or an organisation that they are familiar with are all permissible as the context. Where the evidence is used as part of the competence based element of apprenticeship, the context must be a realistic working environment.

Assessment and Grading Criteria

The unit is achieved by meeting each of the assessment criteria, outlined in the unit specification. All of the assessment criteria must be met for the unit concerned.

A unit certificate is awarded to learners who pass that unit. There are no further categories of pass; the certificate is not graded.

CT179: Delivery of Effective Customer Service

Aim

To enable the learner to develop an appropriate knowledge and understanding of the principles of effective customer service.

Credit 6

GLH 50

Learning outcomes The learner will	Assessment criteria The learner can
1. Describe the principles of customer service	1.1 Identify the purpose of customer service 1.2 Describe how customer service affects the success of the organisation 1.3 Describe different types of customers of an organisation 1.4 Identify the range of customer needs 1.5 Identify the customer service information which may be retained 1.6 Identify the difference between providing a product and providing a service 1.7 Describe what is meant by an after-sales service 1.8 Describe what is meant by a Unique Selling Point (USP) and a Unique Service Offer (USO) 1.9 Identify the methods a customer service deliverer can use to keep product and service knowledge up-to-date 1.10 Describe how an organisation can promote its products and/or services

<p>2. Understand how customer needs and expectations are formed</p>	<p>2.1 Describe the purpose of an organisation's service offer</p> <p>2.2 Describe how customer expectations are formed</p> <p>2.3 Describe the interrelationship between customer satisfaction and customer expectations</p> <p>2.4 Describe how customer needs can be identified</p> <p>2.5 Identify the methods of obtaining customer feedback</p> <p>2.6 Describe how an organisation can maintain customer loyalty</p> <p>2.7 Identify why it is important to ensure effective customer relationships are maintained</p> <p>2.8 Describe why it is important for a customer to be able to identify a 'brand'</p>
<p>3. Understand principles of responding to customers' problems or complaints</p>	<p>3.1 Identify common causes of customer problems and complaints</p> <p>3.2 Identify different methods of communication</p> <p>3.3 Describe the importance of adapting methods of communication and behaviour to meet the individual needs of customers</p> <p>3.4 Explain how the non verbal communication of the service deliverer can affect the behaviour of the customer</p> <p>3.5 Describe how personal presentation, approach and attitude will influence the perception of the service delivered</p>

<p>4. Identify the interpersonal and team working skills required in the customer service environment</p>	<p>4.1 Describe the skills required for effective teamworking</p> <p>4.2 Describe how to maintain effective working relationships within a team</p> <p>4.3 Describe the range of inter-personal skills required for effective customer service</p>
<p>5. Identify the legislation which supports the customer service process</p>	<p>5.1 Identify the key aspects of the legislation relating to consumer law</p> <p>5.2 Identify the main principles of equal opportunities legislation in relation to providing customer service</p> <p>5.3 Identify the responsibilities of the employer and employee under the Health and Safety at Work Act</p> <p>5.4 Describe why it is important to respect customer and organisation confidentiality</p> <p>5.5 Identify the main principles of the Data Protection Act</p> <p>5.6 Identify how a code of practice or ethical standards can impact upon the activities of a service deliverer</p>

CU854: Supporting the Customer Service Environment

Aim

To enable learners to develop and apply the practical skills required to support the customer service environment.

Credit 7

GLH 65

Learning outcomes The learner will	Assessment criteria The learner can
<p>1. Apply the practical skills required to deliver effective customer service</p>	<p>1.1 Identify the type of organisation</p> <p>1.2 Identify the organisation's customers including internal and/or external and those with specific needs</p> <p>1.3 Illustrate a customer service supply chain within an organisation</p> <p>1.4 Maintain established customer records</p> <p>1.5 Suggest a unique selling point or unique service offer for a product or service</p> <p>1.6 Suggest ways of promoting a product or service to increase customer awareness</p> <p>1.7 Compare the strengths and weaknesses of the promotional methods available</p>

<p>2. Demonstrate how to meet customer needs and expectations</p>	<p>2.1 Identify how customers demonstrate their own individual needs and expectations</p> <p>2.2 Identify customers with special requirements</p> <p>2.3 Identify how to adapt methods of communication and behaviour to meet the individual needs of specified customers</p> <p>2.4 Identify and use methods of checking customer satisfaction</p> <p>2.5 Identify ways in which an organisation might improve its reputation</p>
<p>3. Communicate effectively with customers</p>	<p>3.1 Use different methods of communication</p> <p>3.2 Identify the interpersonal skills which are required for effective team-working</p> <p>3.3 Describe how to adapt own behaviour to meet the individual needs of the team</p> <p>3.4 Use the telephone system efficiently and effectively</p> <p>3.5 Identify the personal qualities required to deal with customer problems</p> <p>3.6 Describe the skills required to deal with potentially stressful situations</p> <p>3.7 Apply problem solving theories to resolving a customer service problem</p> <p>3.8 Identify the process of solving a customer problem or complaint</p>

<p>4. Apply customer service improvements and develop self</p>	<p>4.1 Devise a method for obtaining customer feedback</p> <p>4.2 Identify why it is important to give a positive impression to customers about changes made to customer service procedures</p> <p>4.3 Identify how own behaviour might affect the behaviour of others</p> <p>4.4 Identify how to obtain useful and constructive feedback from others about own performance</p> <p>4.5 Identify own strengths and weaknesses in relation to working within a customer service role</p> <p>4.6 Apply the techniques of self assessment to look at strengths and weaknesses</p> <p>4.7 Produce a Training Needs Analysis (TNA) for self</p> <p>4.8 Prepare an individual learning/development plan which could be used as a basis for discussion with a relevant person, eg tutor, line manager, HR, training department</p>
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